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3 **NONINSTRUCTIONAL OPERATIONS**

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5 Records Management

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7 The District will retain, in a manner consistent with applicable law and the state’s *Rules for*  
8 *Disposition of Local Government Records*, such records as are required by law or regulations to  
9 be created and/or maintained, and such other records as are related to students, school personnel,  
10 and the operations of the schools.

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12 For the purpose of this policy, “records” are all documentary materials, regardless of media or  
13 characteristics, made or received and maintained by the school unit in transaction of its business.  
14 Records include email and other digital communications sent and received.

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16 Records may be created, received, and stored in multiple formats, including but not limited to  
17 print, microfiche, audio and videotapes, and various digital forms (on hard drives, computer  
18 disks and CDs, servers, flash drives, etc.).

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20 The Principal will be responsible for developing and implementing a records management  
21 program for the cataloging, maintenance, storage, retrieval, and disposition of school records.  
22 The Principal will also be responsible for developing guidelines to assist school employees in  
23 understanding the kinds of information that must be saved and those which can be disposed of or  
24 deleted. The Principal may delegate records-management responsibilities to other school  
25 personnel at his/her discretion to facilitate implementation of this policy.

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27 Litigation Holds for Electronic Stored Information (ESI)

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29 The School District will have an ESI Team. The ESI Team is a designated group of individuals  
30 who implement and monitor litigation holds, a directive not to destroy ESI that might be relevant  
31 to a pending or imminent legal proceeding. The ESI Team will include a designated school  
32 administrator, an attorney, and a member from the Technology Department. In the case of a  
33 litigation hold, the ESI Team shall direct employees and the Technology Department, as  
34 necessary, to suspend the normal retention procedure for all related records.

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36 Inspections of ESI

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38 Any requests for ESI records should be made in writing and will be reviewed by the  
39 Superintendent or designee, in consultation with an attorney if needed, and released in  
40 accordance with Montana public records law.

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42 Delegated Authority

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44 The Board delegates to the Principal or designees the right to implement and enforce additional  
45 procedures or directives relating to ESI retention consistent with this policy, as needed.

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Cross Reference:     1402           School Board Use of Electronic Mail  
                          3600, 3600P   Student Records  
                          5231, 5231P   Personnel Records  
                          5450           Employee Electronic Mail and On-Line Services Usage

Legal Reference:     Montana Secretary of State (Rules for Disposition of Local Government  
                          Records)  
                          Federal Rules of Civil Procedure (FRCP)  
                          § 2-6-403, MCA     Duties and responsibilities  
                          § 20-1-212, MCA    Destruction of records by school officer  
                          § 20-7-101(2), MCA Standards of accreditation  
                          § 20-9-215, MCA    Destruction of certain financial records  
                          24.9.805 (4), ARM   Employment Records

Policy History:

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